

Application for Recognition of Exemption Under Section 501(a)

OMB No. 1545-0057

If exempt status is approved,
this application will be open
for public inspection.

Read the instructions for each Part carefully. **A User Fee must be attached to this application.**
If the required information and appropriate documents are not submitted along with Form 8718 (with payment
of the appropriate user fee), the application may be returned to the organization.

Complete the Procedural Checklist on page 6 of the instructions.

Part I. Identification of Applicant (Must be completed by all applicants; also complete appropriate schedule.) Submit only the schedule that applies to your organization. Do not submit blank schedules.

Check the appropriate box below to indicate the section under which the organization is applying:

- a ☐ Section 501(c)(2)—Title holding corporations (Schedule A, page 7)
b ☒ Section 501(c)(4)—Civic leagues, social welfare organizations (including certain war veterans' organizations), or local associations of employees (Schedule B, page 8)
c ☐ Section 501(c)(5)—Labor, agricultural, or horticultural organizations (Schedule C, page 9)
d ☐ Section 501(c)(6)—Business leagues, chambers of commerce, etc. (Schedule C, page 9)
e ☐ Section 501(c)(7)—Social clubs (Schedule D, page 11)
f ☐ Section 501(c)(8)—Fraternal beneficiary societies, etc., providing life, sick, accident, or other benefits to members (Schedule E, page 13)
g ☐ Section 501(c)(9)—Voluntary employees' beneficiary associations (Parts I through IV and Schedule F, page 14)
h ☐ Section 501(c)(10)—Domestic fraternal societies, orders, etc., not providing life, sick, accident, or other benefits (Schedule E, page 13)
i ☐ Section 501(c)(12)—Benevolent life insurance associations, mutual ditch or irrigation companies, mutual or cooperative telephone companies, or like organizations (Schedule G, page 15)
j ☐ Section 501(c)(13)—Cemeteries, crematoria, and like corporations (Schedule H, page 16)
k ☐ Section 501(c)(15)—Mutual insurance companies or associations, other than life or marine (Schedule I, page 17)
l ☐ Section 501(c)(17)—Trusts providing for the payment of supplemental unemployment compensation benefits (Parts I through IV and Schedule J, page 18)
m ☐ Section 501(c)(19)—A post, organization, auxiliary unit, etc., of past or present members of the Armed Forces of the United States (Schedule K, page 19)
n ☐ Section 501(c)(25)—Title holding corporations or trusts (Schedule A, page 7)

1a Full name of organization (as shown in organizing document)

USAction

2 Employer identification number (EIN) (if none, see Specific Instructions on page 2)
52 : 2214305

1b c/o Name (if applicable)

3 Name and telephone number of person to be contacted if additional information is needed

Jeff Blum

1c Address (number and street),
1341 G Street, N.W.

Room/Suite
1000

1d City, town or post office, state, and ZIP + 4 If you have a foreign address, see Specific Instructions for Part I, page 2.

Washington, D.C. 20005

(202) 624-1730

1e Web site address
www.usaction.org

4 Month the annual accounting period ends
December

5 Date incorporated or formed
12/23/99

6 Did the organization previously apply for recognition of exemption under this Code section or under any other section of the Code? ☐ Yes ☒ No
If "Yes," attach an explanation.

7 Has the organization filed Federal income tax returns or exempt organization information returns? ☐ Yes ☒ No
If "Yes," state the form numbers, years filed, and Internal Revenue office where filed.

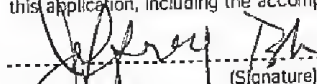
8 Check the box for the type of organization. ATTACH A CONFORMED COPY OF THE CORRESPONDING ORGANIZING DOCUMENTS TO THE APPLICATION BEFORE MAILING.

- a ☒ Corporation— Attach a copy of the Articles of Incorporation (including amendments and restatements) showing approval by the appropriate state official; also attach a copy of the bylaws.
b ☐ Trust— Attach a copy of the Trust Indenture or Agreement, including all appropriate signatures and dates.
c ☐ Association— Attach a copy of the Articles of Association, Constitution, or other creating document, with a declaration (see instructions) or other evidence that the organization was formed by adoption of the document by more than one person. Also include a copy of the bylaws.

If this is a corporation or an unincorporated association that has not yet adopted bylaws, check here ☐

I declare under the penalties of perjury that I am authorized to sign this application on behalf of the above organization, and that I have examined this application, including the accompanying schedules and attachments, and to the best of my knowledge it is true, correct, and complete.

PLEASE
SIGN
HERE


(Signature)

Jeffrey Blum, Executive Dir. 11/15/00
(Type or print name and title or authority of signer) (Date)

For Paperwork Reduction Act Notice, see page 5 of the instructions.

Part II. Activities and Operational Information (Must be completed by all applicants)

- 1 Provide a detailed narrative description of all the activities of the organization—past, present, and planned. Do not merely refer to or repeat the language in the organizational document. List each activity separately in the order of importance based on the relative time and other resources devoted to the activity. Indicate the percentage of time for each activity. Each description should include, as a minimum, the following: (a) a detailed description of the activity including its purpose and how each activity furthers your exempt purpose; (b) when the activity was or will be initiated; and (c) where and by whom the activity will be conducted.

PLEASE SEE ATTACHED NARRATIVE

- 2 List the organization's present and future sources of financial support, beginning with the largest source first.

Contributions
Dues
Annual Event

Page two

Part II. Activities and Operational Information

1. USAction was established to promote the public interest, including, but not limited to the promotion of economic, racial, social and environmental justice in the United States. USAction promotes the principle that diversity, tolerance, racial justice and multiculturalism are great values to our democratic society and seeks, through its activities, campaigns and programs, to promote their importance

USAction and its affiliate members engage in direct (local and state legislatures and the United States Congress) as well as grassroots lobbying on the wide range of public interest and consumer issues, including, but not limited to: social, human and health security (e.g., working to ensure the availability and accessibility of health care for all Americans or the strengthening of social security and Medicare); promoting public education; civil justice (e.g., promoting a fair jury trial system as a basic element of democracy); environmental concerns (e.g., regulatory reform, climate change and air quality standards); public utilities deregulation, including telecommunications; workplace protections (e.g., a workplace free from discrimination, freedom of association, minimum wage safeguards); and, campaign finance reform (e.g., exploring public financing options or programs to reinvigorate democracy).

Communication with its members as well as the general public on these issues will be conducted through the mail (a newsletter), telephone (conference calls), on the Internet (web site and e-mail), media appearances and media advertising. It is anticipated that some communication with members will occur at regularly-scheduled meetings of USAction.

USAction recognizes that one of its most effective organizing tools is the ability to work collaboratively in coalition with other organizations, many of which are members of USAction. Thus USAction will work in coalition with a wide range of organizations and groups (e.g., other public interest, labor, women, senior citizen, faith-based, consumer, good government, education, disability rights) to develop strategies which address the foregoing issues, analyze an issue's strengths and weaknesses and create momentum for reform, change or modification as appropriate.

For example, it could work collaboratively with senior citizen and labor organizations to expand access to health insurance, both by winning public funding for such benefits and by working to ensure that those eligible are made of these public programs. It may also work with labor organizations on their efforts to enforce the World Trade Organization

(WTO) rules guaranteeing workers' basic rights and reverse the inequities in the current global economic system. It is working with research centers, parent advocacy organizations, civil rights groups and national and state teacher organizations to articulate a vision for educating students for democracy and to develop a program and message which strengthens public education. USAction is part of a coalition of consumer rights, labor and trial attorney organizations to oppose limitations on the amount of monetary awards given to victims of professional malpractice or products liability. It works with good government groups (Common Cause, League of Women Voters) and other reform groups (Public Campaign) on the virtues of campaign finance reform, including identifying projects in which USAction's priority issue campaigns can link to promoting campaign finance reform.

USAction employs 3.5 senior staff along with the corresponding support staff who are responsible for all aspects of the organization (program, financial and administrative). It is assisted in fundraising, outreach to other organizations and issue development by its 90-member Board of Directors.

Form 1024
Attachment
USAction
52-2214305

Page three
Part II Activities and Operational Information

OFFICERS

William McNary, President
28 East Jackson Boulevard, Suite 605
Chicago, Illinois 60604

Marti Rosenberg, Secretary/Treasurer
31 Talbot Manor
Cranston, Rhode Island 02905

Heather Booth, Vice President
3724 Benton Street, N.W.
Washington, D.C. 20007

Deana Knutsen, Vice President
17406 62nd Avenue
Lynnwood, Washington 98037

Randall Merritt, Vice President
340 King Avenue
Athens, Georgia 30606

Luis Wilmot, Vice President
450 Mary Louise Drive
San Antonio 78201

No officer receives compensation for the work he or she performs as an officer of USAction.

BOARD MEMBERS

Ruth Alice Anderson
Post Office Box 40184
Portland, Oregon 97240

Tom Balanoff
1165 North Clark Street, #500
Chicago, Illinois 60610

Tammy Baldwin
10 East Doty Street, #405
Madison, Wisconsin 53703

Ed Bannister
5 Tall Oaks Court
Bolingbrook, Illinois 60440

Max Bartlett
Post Office Box 4777
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Nancy Benedict
62 Hop River Road
Coventry, Connecticut 06238

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Board members
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626 Broad Street
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208 East Main Street
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Marietta, Georgia 30062

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Seattle, Washington 98102

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Kalamazoo, Michigan 49008

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Nashville, Tennessee 37228

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Chicago, Illinois 60604

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Hartford, Connecticut 06105

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Bangor, Maine 04401

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1415 12th Avenue SE
Jamestown, North Dakota 58401

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Selma, Oregon 97538

Ali Fischer
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Board members
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Board members
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Soyun Park
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Tom Swan
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West Hartford, Connecticut 06110

Crystal Peoples
790 East Delavan Avenue
Buffalo, New York 14215

Dillard Tabor
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LaMoundre Pough
1212 Metzce Road, #9C
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Kalamazoo, Michigan 49007

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Athens, Georgia 30601

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Philadelphia, Pennsylvania 19103

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Kendall Wolcott
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Missoula, Montana 59802

Anthony Wright
85 Raritan Avenue, #100
Highland Park, New Jersey 08904

No director receives compensation for the work he or she performs as a member of the
USAction Board of Directors

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Part II. Activities and Operational Information

5. It is likely that USAction will share facilities, equipment and staff with the USAction Educational Fund. These arrangements for shared facilities, equipment and staff will be entered into only after a specific contract is negotiated and signed by the appropriate parties.
7. There are four classes of membership: national organizations, state organizations, action councils and support organizations which are those organizations who (a) share USAction's purpose and goals and (b) pay periodic dues, in an amount established by the Board of directors and fulfill other reasonable requirements adopted from time to time by the Board of Directors
8. Upon dissolution of this corporation, its assets remaining after payment, or provisions for payment, of all debts and liabilities of the corporation shall be distributed for one or more exempt purpose within the meaning of Section 501(c)(4) of the Internal Revenue Code or the corresponding section of any future federal code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a court of competent jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine which are organized and operated exclusively for such purposes.

Part II. Activities and Operational Information (continued)

- 9 Has the organization made or does it plan to make any distribution of its property or surplus funds to shareholders or members? ☐ Yes ☒ No
 If "Yes," state the full details, including: (1) amounts or value; (2) source of funds or property distributed or to be distributed; and (3) basis of, and authority for, distribution or planned distribution.

- 10 Does, or will, any part of your organization's receipts represent payments for services performed or to be performed? ☐ Yes ☒ No
 If "Yes," state in detail the amount received and the character of the services performed or to be performed.

- 11 Has the organization made, or does it plan to make, any payments to members or shareholders for services performed or to be performed? ☒ Yes ☐ No
 If "Yes," state in detail the amount paid, the character of the services, and to whom the payments have been, or will be, made.

SEE ATTACHED

- 12 Does the organization have any arrangement to provide insurance for members, their dependents, or others (including provisions for the payment of sick or death benefits, pensions, or annuities)? ☐ Yes ☒ No
 If "Yes," describe and explain the arrangement's eligibility rules and attach a sample copy of each plan document and each type of policy issued.

- 13 Is the organization under the supervisory jurisdiction of any public regulatory body, such as a social welfare agency, etc.? ☐ Yes ☒ No
 If "Yes," submit copies of all administrative opinions or court decisions regarding this supervision, as well as copies of applications or requests for the opinions or decisions.

- 14 Does the organization now lease or does it plan to lease any property? ☒ Yes ☐ No
 If "Yes," explain in detail. Include the amount of rent, a description of the property, and any relationship between the applicant organization and the other party. Also, attach a copy of any rental or lease agreement. (If the organization is a party, as a lessor, to multiple leases of rental real property under similar lease agreements, please attach a single representative copy of the leases.) We are currently negotiating a lease for office space @ \$31.50/sq.ft for a total of about \$4,000.00/month. The property is class B office space in a Washington, DC, office building. We sublet from the Community Transportation Association of America.

- 15 Has the organization spent or does it plan to spend any money attempting to influence the selection, nomination, election, or appointment of any person to any Federal, state, or local public office or to an office in a political organization? ☐ Yes ☒ No
 If "Yes," explain in detail and list the amounts spent or to be spent in each case.

- 16 Does the organization publish pamphlets, brochures, newsletters, journals, or similar printed material? ☒ Yes ☐ No
 If "Yes," attach a recent copy of each.

Part II. Activities and Operational Information (continued)

- 9 Has the organization made or does it plan to make any distribution of its property or surplus funds to shareholders or members? ☐ Yes ☒ No
If "Yes," state the full details, including: (1) amounts or value; (2) source of funds or property distributed or to be distributed; and (3) basis of, and authority for, distribution or planned distribution.

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If "Yes," explain in detail. Include the amount of rent, a description of the property, and any relationship between the applicant organization and the other party. Also, attach a copy of any rental or lease agreement. (If the organization is a party, as a lessor, to multiple leases of rental real property under similar lease agreements, please attach a single representative copy of the leases.)

Currently it is a standard office lease.

- 15 Has the organization spent or does it plan to spend any money attempting to influence the selection, nomination, election, or appointment of any person to any Federal, state, or local public office or to an office in a political organization? ☐ Yes ☒ No
If "Yes," explain in detail and list the amounts spent or to be spent in each case.

- 16 Does the organization publish pamphlets, brochures, newsletters, journals, or similar printed material? ☒ Yes ☐ No
If "Yes," attach a recent copy of each.

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Part II Activities and Operational Information

11. USAction intends to utilize the considerable expertise and experience of its affiliate members in promoting the public interest and will, therefore, contract periodically with them to manage and administer specific tasks. USAction's Campaign for Social and Health Security is currently contracting with affiliate members to undertake particular grass root and field activities on the issues of health care and social security. The amounts of these contracts range from \$1,000 to \$20,000.

Part III. Financial Data (Must be completed by all applicants)

Complete the financial statements for the current year and for each of the 3 years immediately before it. If in existence less than 4 years, complete the statements for each year in existence. If in existence less than 1 year, also provide proposed budgets for the 2 years following the current year.

A. Statement of Revenue and Expenses

Revenue	(a) Current Tax Year	3 Prior Tax Years or Proposed Budget for Next 2 Years			(e) Total
	From 1/1/00 To 12/31/00	(b) 2001	(c) 2002	(d) _____	
1 Gross dues and assessments of members	125,000	135,000	139,050		393,000
2 Gross contributions, gifts, etc.	639,850	393,000	404,790		1,437,640
3 Gross amounts derived from activities related to the organization's exempt purpose (attach schedule) (Include related cost of sales on line 9.)					
4 Gross amounts from unrelated business activities (attach schedule)					
5 Gain from sale of assets, excluding inventory items (attach schedule)					
6 Investment income (see page 3 of the instructions)	43,648	158,797	103,890		306,335
7 Other revenue (attach schedule).	808,498	686,797	647,730		2,143,025
8 Total revenue (add lines 1 through 7)					
Expenses					
9 Expenses attributable to activities related to the organization's exempt purposes.					
10 Expenses attributable to unrelated business activities					
11 Contributions, gifts, grants, and similar amounts paid (attach schedule).					
12 Disbursements to or for the benefit of members (attach schedule)					
13 Compensation of officers, directors, and trustees (attach schedule)	102,835	172,087	176,622		451,544
14 Other salaries and wages.					
15 Interest	15,000	24,000	24,720		63,720
16 Occupancy					
17 Depreciation and depletion	554,287	410,877	421,492		1,386,656
18 Other expenses (attach schedule)	672,122	606,964	622,834		1,901,920
19 Total expenses (add lines 9 through 18)	136,376	79,833	24,896		241,105
20 Excess of revenue over expenses (line 8 minus line 19)					

B. Balance Sheet (at the end of the period shown)

Assets		Current Tax Year as of 9/30/00	
		1	2
1 Cash		62,656	
2 Accounts receivable, net		3,953	
3 Inventories			
4 Bonds and notes receivable (attach schedule)			
5 Corporate stocks (attach schedule).			
6 Mortgage loans (attach schedule)			
7 Other investments (attach schedule)			
8 Depreciable and depletable assets (attach schedule)			
9 Land			
10 Other assets (attach schedule)			
11 Total assets		66,609	
Liabilities			
		12	13
12 Accounts payable			
13 Contributions, gifts, grants, etc., payable			
14 Mortgages and notes payable (attach schedule)			
15 Other liabilities (attach schedule)			
16 Total liabilities.			
Fund Balances or Net Assets			
		17	18
17 Total fund balances or net assets		66,609	
18 Total liabilities and fund balances or net assets (add line 16 and line 17)		66,609	

If there has been any substantial change in any aspect of the organization's financial activities since the end of the period shown above, check the box and attach a detailed explanation. ☐

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Attachment
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PART III - FINANCIAL DATA

	(a) Current tax Year	(b) 2001	(c) 2002
7. Other revenue			
Events	18,098	16,000	16,500
Consulting	25,550	5,721	5,895
Miscellaneous		500	500
Prior-year carryover		136,576	80,995
Total other revenue	43,648	158,797	103,890
18. Other expenses			
Travel	18,500	11,000	11,300
Meetings	52,000	103,560	106,665
Consulting & contract services	236,700	242,925	249,213
Subscriptions & advertising	204,400	1,500	1,500
Printing	2,000	2,500	2,575
Audit & legal	7,027	8,087	8,150
Telephone expense	21,854	20,504	21,150
Office supplies & equipment	9,329	13,779	13,679
Fees & licenses	1,505	1,550	1,585
Miscellaneous	972	5,472	5,675
Total other expenses	554,287	410,877	421,492

Schedule B**Organizations Described in Section 501(c)(4) (Civic leagues, social welfare organizations (including posts, councils, etc., of veterans' organizations not qualifying or applying for exemption under section 501(c)(19)) or local associations of employees.)**

- 1 Has the Internal Revenue Service previously issued a ruling or determination letter recognizing the applicant organization (or any predecessor organization listed in question 4, Part II of the application) to be exempt under section 501(c)(3) and later revoked that recognition of exemption on the basis that the applicant organization (or its predecessor) was carrying on propaganda or otherwise attempting to influence legislation or on the basis that it engaged in political activity? ☐ Yes ☒ No

If "Yes," indicate the earliest tax year for which recognition of exemption under section 501(c)(3) was revoked and the IRS district office that issued the revocation.

- 2 Does the organization perform or plan to perform (for members, shareholders, or others) services, such as maintaining the common areas of a condominium; buying food or other items on a cooperative basis; or providing recreational facilities or transportation services, job placement, or other similar undertakings? ☐ Yes ☒ No

If "Yes," explain the activities in detail, including income realized and expenses incurred. Also, explain in detail the nature of the benefits to the general public from these activities. (If the answer to this question is explained in Part II of the application (pages 2, 3, and 4), enter the page and item number here.)

- 3 If the organization is claiming exemption as a homeowners' association, is access to any property or facilities it owns or maintains restricted in any way? ☐ Yes ☒ No

If "Yes," explain.

- 4 If the organization is claiming exemption as a local association of employees, state the name and address of each employer whose employees are eligible for membership in the association. If employees of more than one plant or office of the same employer are eligible for membership, give the address of each plant or office.